

# Engaging the Executive Team in Strategy: an amalgam of Appreciative Inquiry and Open Space in Canadian Organizations

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*This story is an amalgam of six similar engagements over the last three years. The organizations involved were government agencies and commercial organisations ranging from 100 to 350 employees, with executive teams of eight to thirteen members. Five of the interventions led to work with the whole system, but all began with a request to work with the senior team and an Executive asking me to assist with strategy. Often these leaders work within a vision and mission with outcomes established by a board or previous planning process. Whether CEOs, Executive Directors, VP's, Assistant Deputy Ministers or Directors, they face similar issues implementing vision and mission. Their concern is usually around better engaging the executive team in leading substantial or transformative change with the improved teamwork required for the task. This story highlights the key phases to engaging a senior team and the successes that follow.*

## Definition

The CEO of a mid-sized Canadian organization approached me through his HR Director to work with his senior team. In initial conversations, I explored the situation and drivers that led them to seek my assistance, the outcomes sought and the indicators of success. Outcomes included having an engaged team with clear strategic initiatives and implementation steps. We planned a two and a half day meeting to accomplish these purposes.

Since the CEO was relatively new, hired to lead a substantial change, establishing his leadership was also key. The board had set a broad vision and the organizational model. The CEO was clear about his aspirations for the organization. Before contacting me, the meeting date and location were set. We had three weeks to plan. He and the HR Director wanted to start with the executive team before considering engaging the whole organization

The CEO wanted a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats). I proposed focusing on vision, strengths and the changes required for success and proposed Open Space Technology to organize the team for action. My next step was interviewing the ten team members by telephone for fifteen to twenty minutes, asking for stories of executive success, wishes for the future and for the event. I also tested the idea of participants developing the agenda. They liked that idea which provided assurance for the CEO.

The interviews increased my credibility with team members and began the Discovery process. I gave the CEO a brief report of interview themes. Later the team heard them. I emphasized that the interviews 'primed the pump' for the event and enabled me to ask more informed questions in guided sessions.

The CEO and I clarified key aspects of the Open Space. The theme: "Challenges and opportunities for enabling our customers and staff to say, 'The organization works for me.'"

The board-approved business plan and the current year budget were givens for their work. The CEO crafted an invitation preparing his team for a participatory event. Combined with the interviews, they came to the session knowing its direction and the CEO's expectations.

### **Discovery & Dream**

The session opened with the CEO setting the context. He presented the outcomes he wanted, acknowledged the team's strengths, described the drivers for change, and stated his vision for the organization and the executive team in the context of the business plan.

The executive team was quite aware of the business plan, but the CEO's vision and expectations provided new information. For example, "Our local responsiveness and core competencies make us vendor of choice for provincial or regional initiatives..." The first conversation engaged the team in revising the vision. With a few changes, they developed a statement with which all could heartily agree.

With that shared sense of overall direction, operational strategy planning began. In pairs and trios, the team members interviewed each other to surface key positive stories that supported the vision, what was of value and their initial wishes for the future of Executive action. As a whole group, we then discussed and celebrated the most powerful stories. The pairs then reviewed their wishes and presented those evoking the most passion to the team where we identified the patterns.

As we explored implementation directions, we agreed that sometimes the executive team is efficient working with CEO direction and increasingly needs to be a team using its own synergy having mutual accountability. We also acknowledged that the executive team is not the organization. Its leadership task is engaging the organization in the desired changes.

By the end, the team shared an image of the organization's future, grounded in current reality, buoyed by their strengths and challenged by the shared patterns in their wishes. The vision statements combined with the wish themes acted as provocative propositions. The event theme was also modified to "enabling partners, customers and staff to say, 'This organization works for US'."

### **Design & Delivery**

Day Two began with the CEO setting the stage. I then invited them to take part in an Open Space. With 10 executives the form was no different from an Open Space with 100 or 600 participants. I walked and bounded the circle, inviting them to identify passions for which they were willing to take responsibility. One session had most of the team. The smallest contained one person thinking through a strategy herself. The CEO put up one topic drawing some of the team. I managed the computer recording process and held the space - encouraging participants to take responsibility for their agenda, organization and outputs. I did a little housekeeping and took a walk.

By day's end, there were 12 reports and an exhilarated team. The right people came and discussed the key implementation ideas. One executive commented that issues niggling at him for a year were acknowledged and a strategy developed. Another commented that he had experienced something like this before, but the facilitator had put the topics into themes at the wall. He was surprised by the difference in energy when the space was really open.

Overnight, the reports were copied and available for breakfast reading. The group completed converging the plans, honoring emergent ideas and leadership, supporting new initiatives or fitting them with existing responsibilities. All topics were discussed, responsibilities confirmed and time lines for next steps determined.

In the closing circle, executive team members effusively praised the approach and the CEO for taking a risk. They were pleased with their shared future image, implementation strategy and the next steps that emerged from their passions and ideas. They felt more connected to each other and to the task at hand. And they recognized that they needed to engage the rest of the organization.

### **Delivery & Results**

Results from these cases continue to come in. Recent feedback from one team shows tangible results or interim progress with all session initiatives. Reduced bureaucracy, improved response times and new information gathering for customers, continue to improve through self-organized as well as formal processes.

A number of executive team sessions have led to engaging other parts or the whole organization. In one case, emergent leaders – those who risked initiating a topic and leading an ongoing initiative – were honored with organizational legitimacy. Sometimes the person had a formal leadership role but often leadership came from people at various levels. Theirs was more a self-organizing leadership bringing together groups that would not normally meet. In another case, all 300 employees engaged in one critical topic. In a third case, six different OST events engaged different stakeholders in aspects of the desired change. In all cases, the CEO commented on changes in culture and enthusiasm – the spirit – emerging from the appreciative frame and OST event.

### **Combining the Two Approaches**

These examples reinforce my experience that co-constructing an appreciative focus, theme and context for self-organization enhances the experience and the outcomes. The inquiry into what works, what is valued and people's wishes prepares participants to lead the journey. Open Space Technology enables strategy and next steps to emerge and self-organize in context, based on passion bounded by responsibility.

The CEO sponsors in these cases all believed that developing a shared positive vision required some guided collective inquiry. It also felt safer to them to have facilitator guidance at the start. The AI surfaced positive stories, generated deeper relationships and brought the group to a shared vision before design and delivery. In Open Space, the guide (facilitator) moved to the background, and the ideas and passion of team members led to self-organized implementation plans generating enthusiasm and ownership for the actions. Through the OS, Design and Delivery emerged, along with a deeper connection to the vision. Given the desired outcomes, combining the two approaches enabled the best results.